

Morning Mantra

MARKET PREVIEW FROM SHAH INVESTOR'S HOME LIMITED'S VIEW

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MARKET COMMENTARY

Indian equity benchmarks ended in red terrain on Monday's trading session, as bears held a tight grip over Dalal Street. After a cautious start, key indices remained lower for the whole day, after the government data showed that India's retail inflation rose to 5.03 per cent in February, mainly on account of higher food prices. Besides, according to the data released by the Ministry of Statistics and Programme Implementation (MoSPI), the Index of Industrial Production (IIP) contracted 1.6 per cent for January 2021.

Markets added more losses in late morning deals, as the Wholesale price-based inflation (WPI) in February rose to its 27-month high to 4.17 percent as against 2.03 percent a month ago in January. This is a 27-month high. Traders were worried, amid reports that foreign portfolio investors (FPIs) were net sellers to the tune of Rs 7,013 crore so far this month in the Indian markets on profit-booking as jitters in global bond markets spooked investors. As per depositories data, FPIs pulled out Rs 531 crore from equities and Rs 6,482 crore from the debt segment between Mar 1-13.

During last hours of the trading session, indices cut some of their losses, however ended in red terrain. Domestic sentiments remained negative, as India reported 26,514 fresh Covid-19 cases on Friday pushing the overall tally to 11,385,158, according to Worldometer. The death toll from the deadly infection jumped to 158,762. Traders overlooked Minister of State for Finance and Corporate Affairs Anurag Thakur's statement that there are green shoots visible in various sectors of the economy and the country is already looking at a V-shaped recovery.

On the global front, European markets were trading higher, as traders remain optimistic for a rapid economic recovery thanks to the rollout of the COVID-19 vaccine. Asian markets ended mixed on Monday, after the value of core machine orders in Japan slipped a seasonally adjusted 4.5 percent on month in January, the Cabinet Office said on Monday - standing at 841.7 billion yen. That exceeded expectations for a decline of 5.5 percent following the upwardly revised 5.3 percent increase in December (originally 5.2 percent). On a yearly basis, core machine orders climbed 1.5 percent - again beating forecasts for a decline of 0.2 percent after spiking 11.8 percent in the previous month.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	50395.08	-397.00	-0.78
NIFTY	14929.50	-99.30	-0.66
MIDCAP	20429.11	-148.10	-0.72
SMLCAP	21095.79	-113.28	-0.53
BSEFMC	12216.10	-14.34	-0.12
AUTO	23331.27	-120.05	-0.51
POWER	2538.86	24.71	0.98
REALTY	2773.28	-11.88	-0.43
BSE IT	26370.43	86.89	0.33
BANKEX	39630.01	-365.57	-0.91
OIL GAS	15779.91	-110.99	-0.70
METAL	14078.43	206.86	1.49
INDIA VIX	21.23	-0.48	-2.21

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	691	1313	70
BSE	1165	1901	197

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4824	9783	(51)
NSE CASH	60062	67368	(11)
NSE F&O	3262881	2789169	17

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	40.66	4.23	1.06
SENSEX	35.25	3.41	0.71

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4036	4786	(750)
FII	6659	7760	(1101)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	5427.07	5924.20	(497)
Index Options	422032.67	419146.66	2886
Stock Futures	11328.09	12129.06	(801)
Stock Options	16546.51	16684.51	(138)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.93	1.02
BANK NIFTY	0.69	0.67

SECURITIES BAN FOR TRADE IN F&O FOR 16-03-2021

BHEL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.203	6.232	-0.02
USA	1.632	1.635	-0.19

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.82	91.67	0.16

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	72.63	-0.26	-0.36
26-Mar-21 EUR-INR	86.73	-0.20	-0.23
26-Mar-21 GBP-INR	101.14	-0.35	-0.34
26-Mar-21 JPY- INR	66.66	-0.23	-0.34

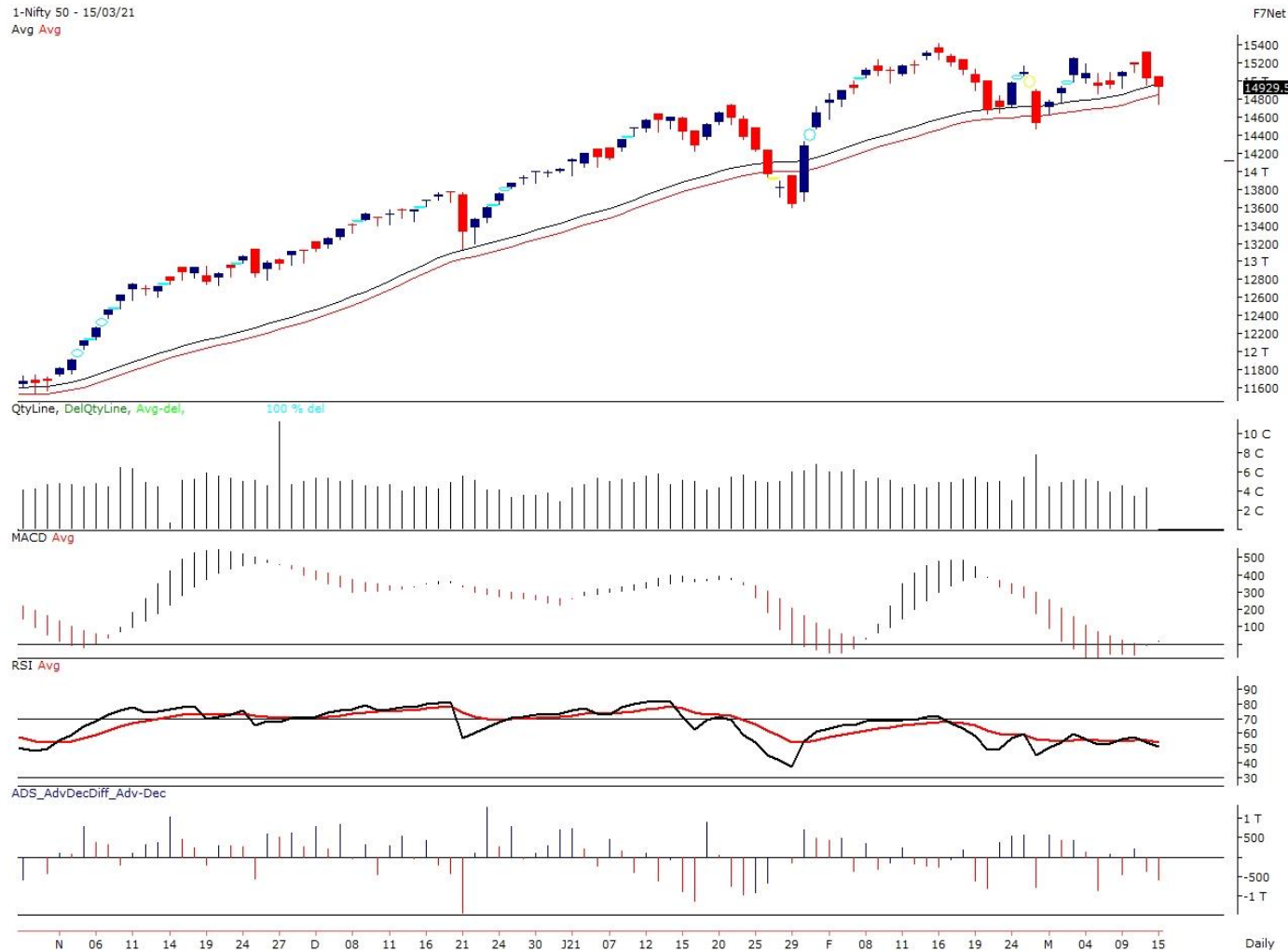
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1729.29	4.30	0.25
Silver	26.14	0.30	1.17
Crude-Oil	65.32	-0.29	-0.44
Brent-Crude	68.84	-0.34	-0.49

INDEX TREND ANALYSIS

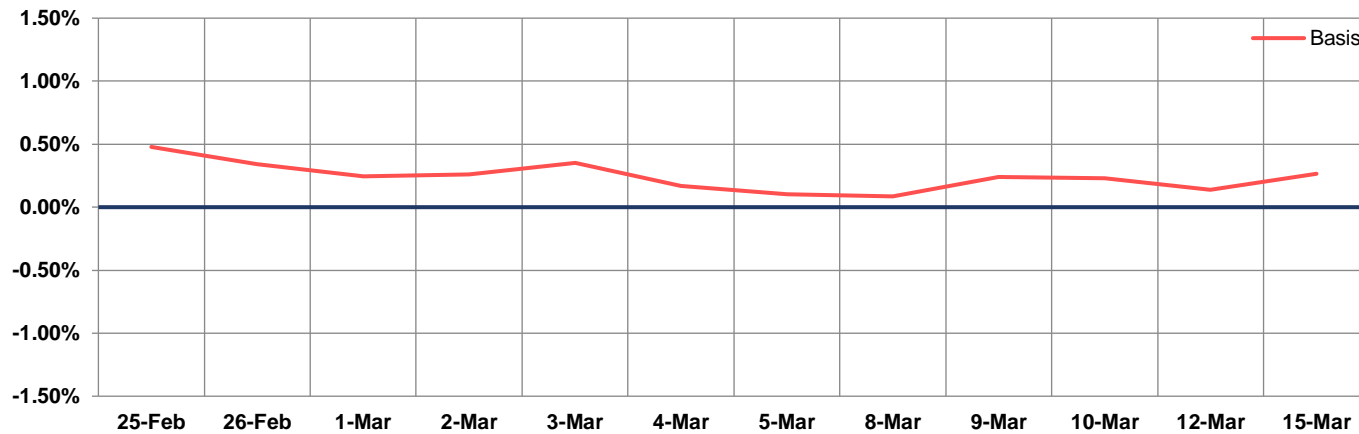
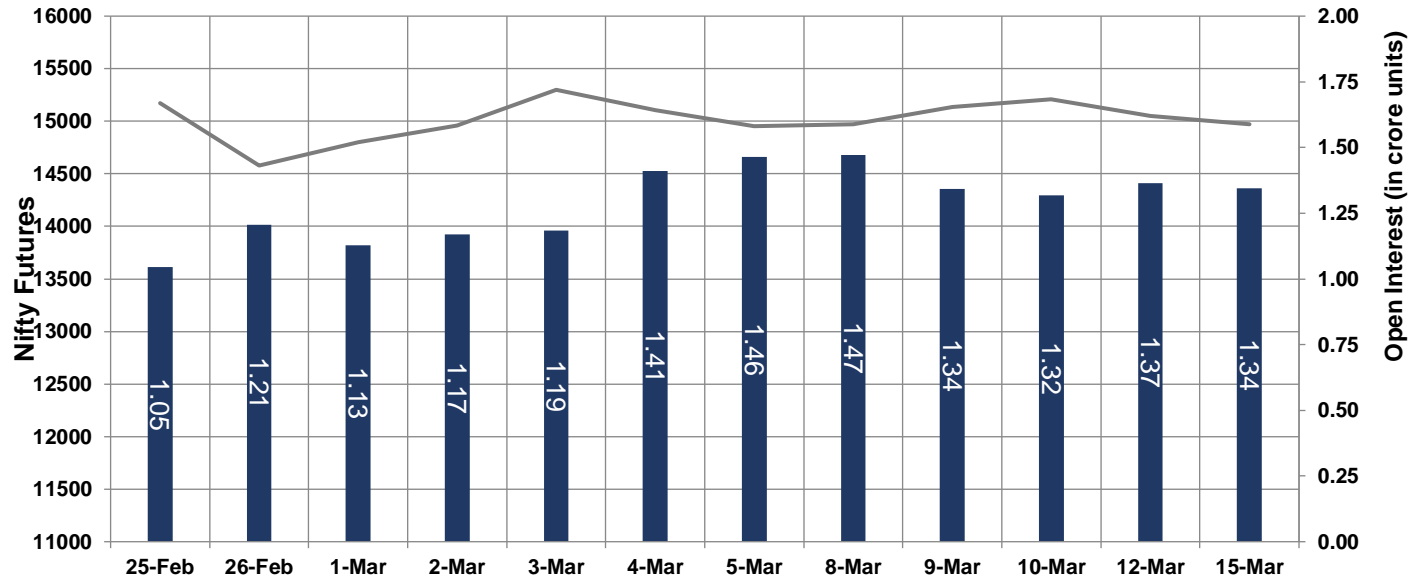
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14930	14605	14767	14908	15070	15210	Neutral	Buy	Buy
SENSEX	50395	49307	49851	50343	50887	51379	Neutral	Buy	Buy
NIFTY FUTURES	14948	14631	14790	14929	15088	15227	Neutral	Buy	Buy
BANK NIFTY	35183	33939	34561	35052	35674	36166	Neutral	Buy	Buy
CNX IT	26032	25484	25758	25926	26200	26368	Buy	Buy	Buy
CNX MIDCAP	23952	23364	23658	23949	24243	24534	Neutral	Buy	Buy
CNX SMALLCAP	8416	8236	8326	8431	8521	8626	Buy	Buy	Buy
INDIA VIX	21.23	19.78	20.50	21.72	22.44	23.66	Sell	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

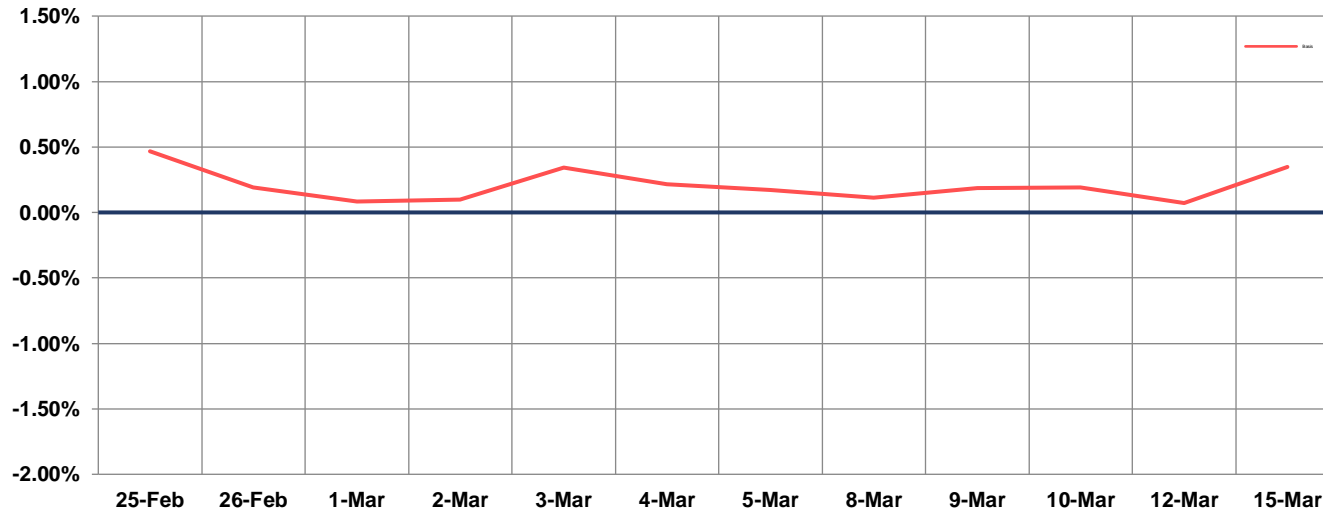
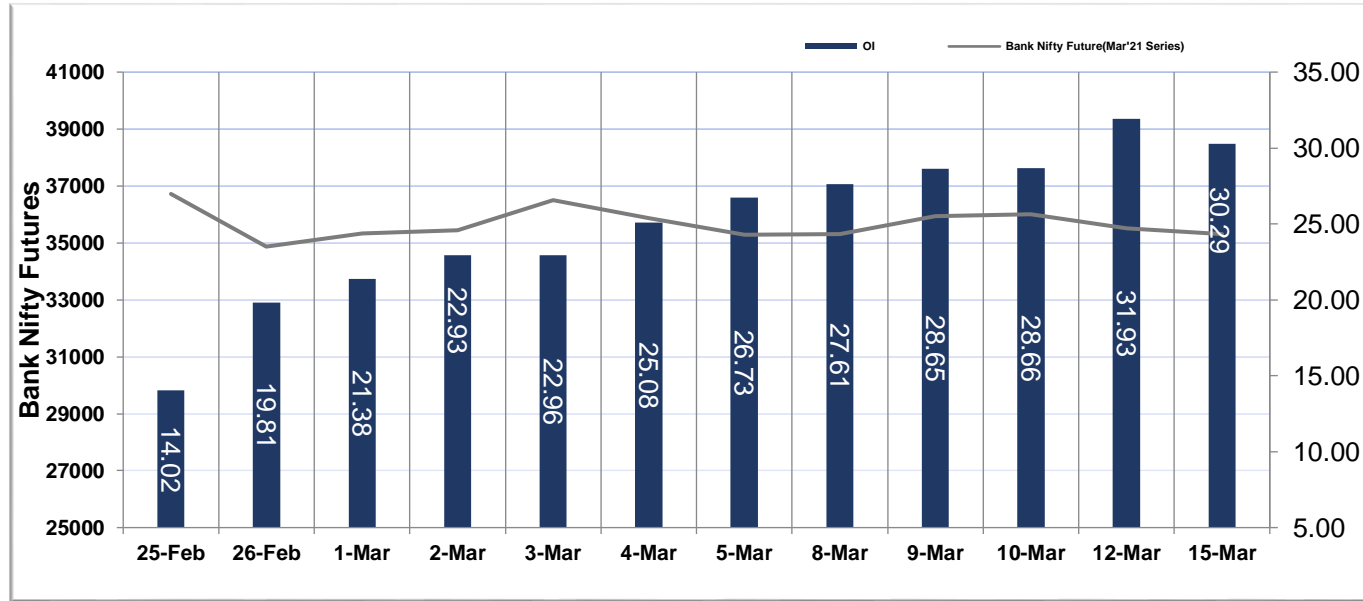


- Nifty Cash prices have settled at **14929.50** down by 0.67 percent from the previous close. On the upper side it has resistance of **15090** and **15170** levels, while lower side it has support of **14790** and **14640** levels. Intraday traders should be cautious and take position accordingly.

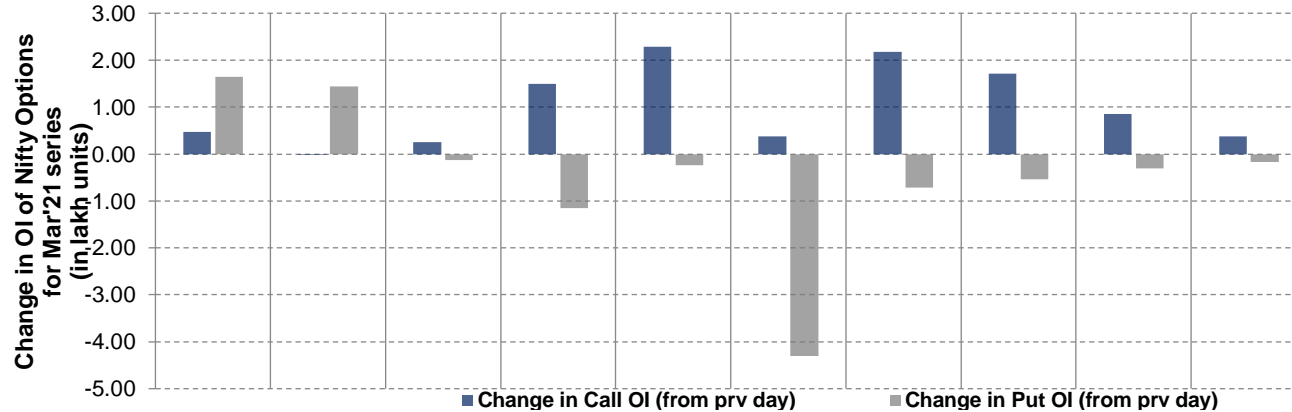
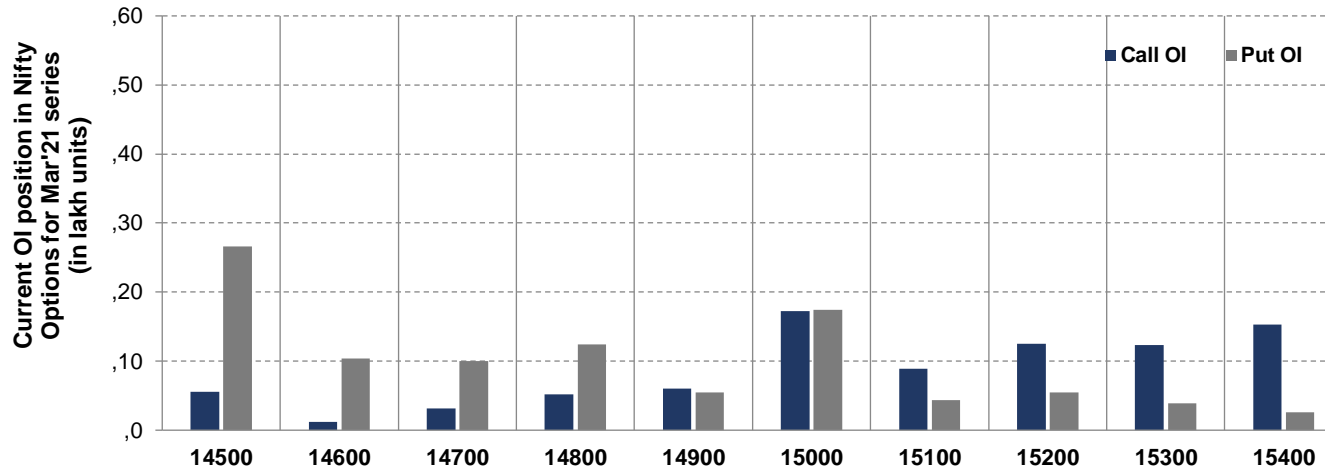
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,000 SP from the March month expiry was the most active call with an addition of 0.04 million in open interests.
- Among Nifty puts 14,500 SP from the March month expiry was the most active put with an addition of 0.16 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (1.72mn) and that for Puts was at 14,500 SP (2.70mn)

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